Vendor Self Service: Account Maintenance

Customer Resource Center
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05/26/2016

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Purpose

To explain to users the different features of Account Information section of the Commonwealth of Kentucky's Vendor Self Service (VSS) website. Including descriptions of the different sub- sections and instructions on how to complete frequently asked account modification request (i.e. address changes, adding new users and etc.).

General Information

Vendor account modifications will not be applied instantaneously. An automated process of matching up VSS and the Commonwealth Internal Database must be completed before any account modifications will become final. During this time, the account modifications will be indicated in Pending status.

After logging into the Kentucky Vendor Self Service system, the defaulted homepage is set to the Account Information tab and Summary sub-tab. The Account Information tab is the central page for account maintenance in VSS.

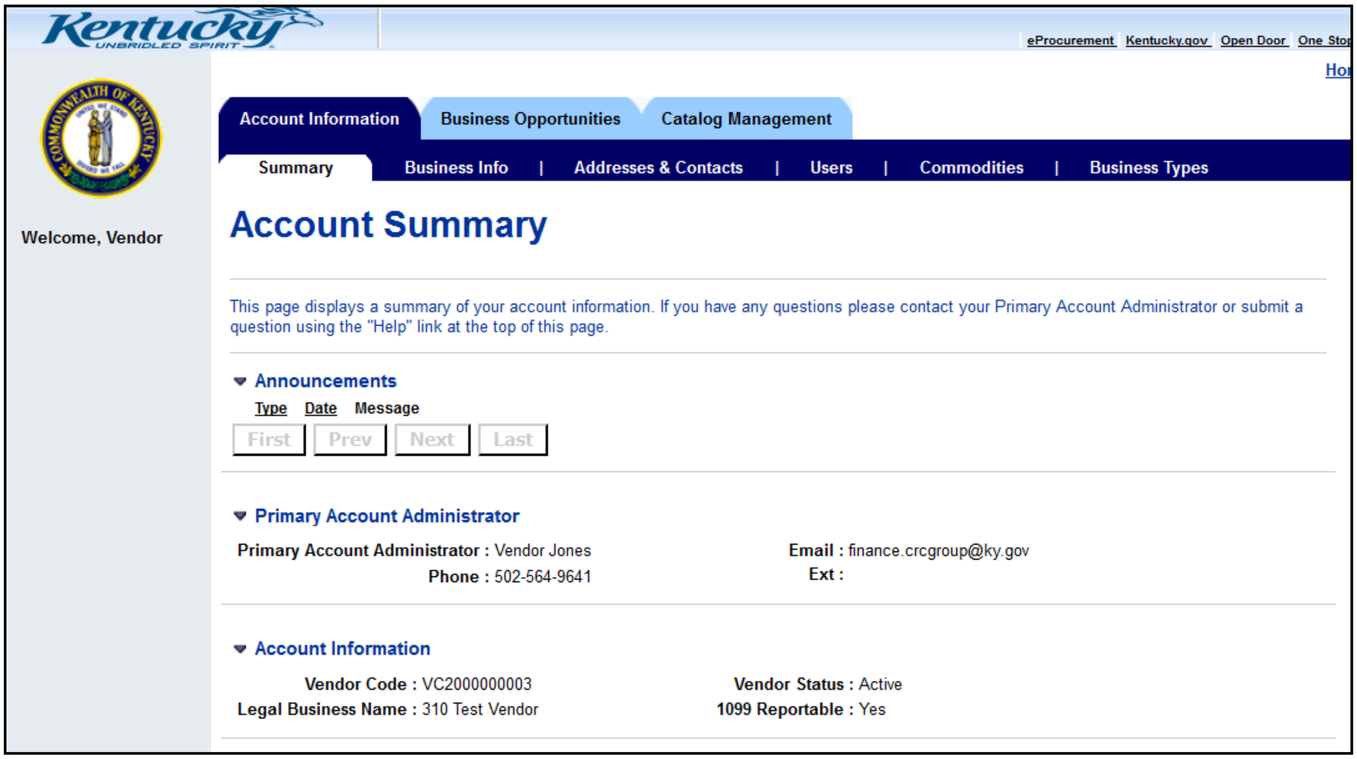
The Account Information tab is broken into the following six (6) sub-tabs:

1. Summary
2. Business Info
3. Addresses & Contacts
4. Users
5. Commodities
6. Business Types

1 – Summary

This Section allows you to view your account's general information.

> **Please Note:**
>
> The Primary Account Administrator is the individual who first registered the company's account on VSS or its designated account holder.

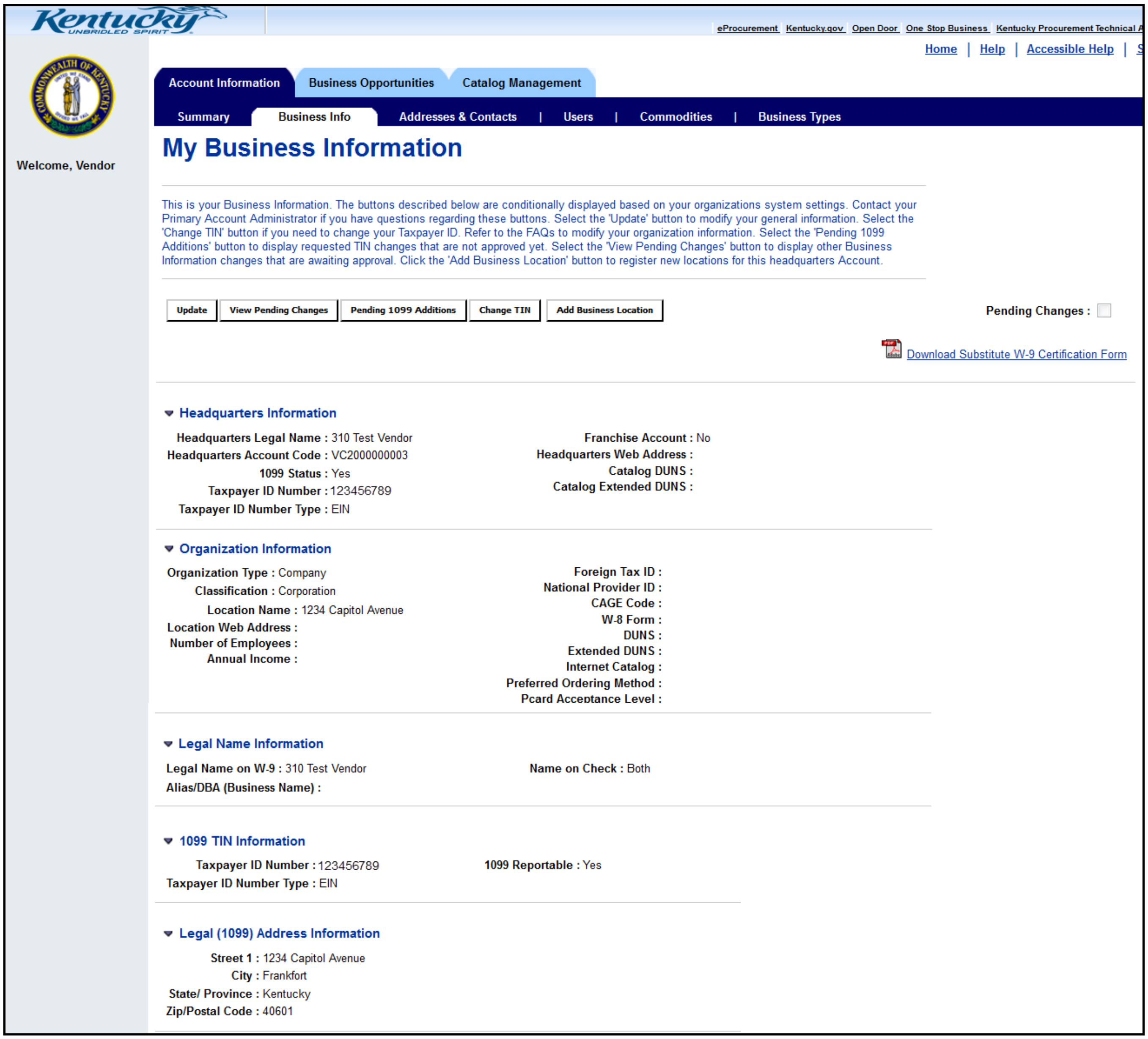


2 – Business Info

This section allows you to update your organizations DBA and your 1099 legal address.

Please Note:

Contact the Customer Resource Center Help Desk directly for Legal Name or Taxpayer ID number changes by email Finance.CRCGroup@ky.gov or call 877-973-4357(toll free) or 502-564-9641.



3 – Addresses & Contacts

This section allows you to view, add or modify addresses and contacts on your vendor record.

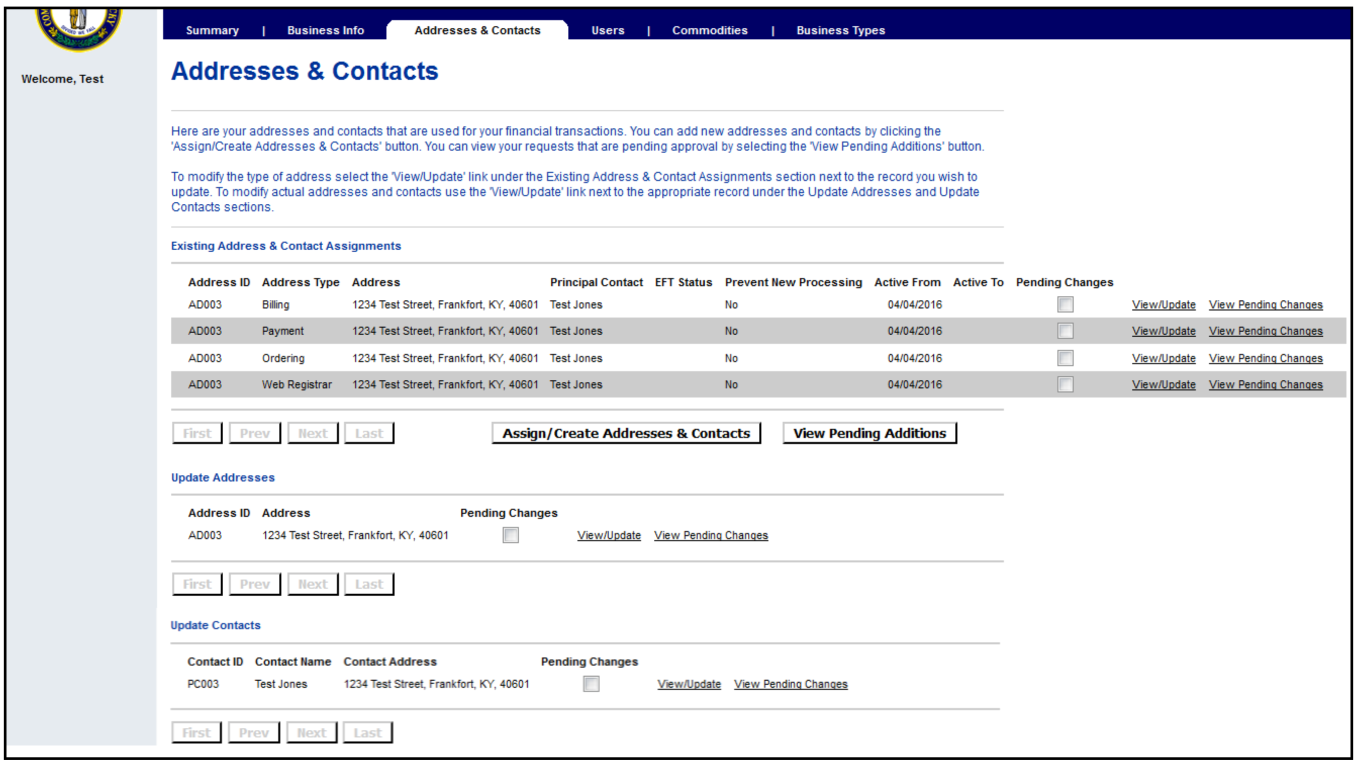
Please Note:

The default Ordering Address record from this page will be used to issue Purchase Orders and other award documents to your organization.

The default Payment Address record from this page will be used to mail your payments to your organization.

You cannot delete an address once it has been added. However, you can update the address by modifying it.

Only Account Administrator and Full Access users will be able to make changes to the address fields. All required fields are preceded by a red asterisk(*).


Summary | Business Info | Addresses & Contacts | Users | Commodities | Business Types

Welcome, Test

Addresses & Contacts

Here are your addresses and contacts that are used for your financial transactions. You can add new addresses and contacts by clicking the 'Assign/Create Addresses & Contacts' button. You can view your requests that are pending approval by selecting the 'View Pending Additions' button.

To modify the type of address select the 'View/Update' link under the Existing Address & Contact Assignments section next to the record you wish to update. To modify actual addresses and contacts use the 'View/Update' link next to the appropriate record under the Update Addresses and Update Contacts sections.

Existing Address & Contact Assignments

Address ID	Address Type	Address	Principal Contact	EFT Status	Prevent New Processing	Active From	Active To	Pending Changes		
AD003	Billing	1234 Test Street, Frankfort, KY, 40601	Test Jones		No	04/04/2016			View/Update	View Pending Changes
AD003	Payment	1234 Test Street, Frankfort, KY, 40601	Test Jones		No	04/04/2016			View/Update	View Pending Changes
AD003	Ordering	1234 Test Street, Frankfort, KY, 40601	Test Jones		No	04/04/2016			View/Update	View Pending Changes
AD003	Web Registrar	1234 Test Street, Frankfort, KY, 40601	Test Jones		No	04/04/2016			View/Update	View Pending Changes

First Prev Next Last Assign/Create Addresses & Contacts View Pending Additions

Update Addresses

Address ID	Address	Pending Changes		
AD003	1234 Test Street, Frankfort, KY, 40601		View/Update	View Pending Changes

First Prev Next Last

Update Contacts

Contact ID	Contact Name	Contact Address	Pending Changes		
PC003	Test Jones	1234 Test Street, Frankfort, KY, 40601		View/Update	View Pending Changes

First Prev Next Last

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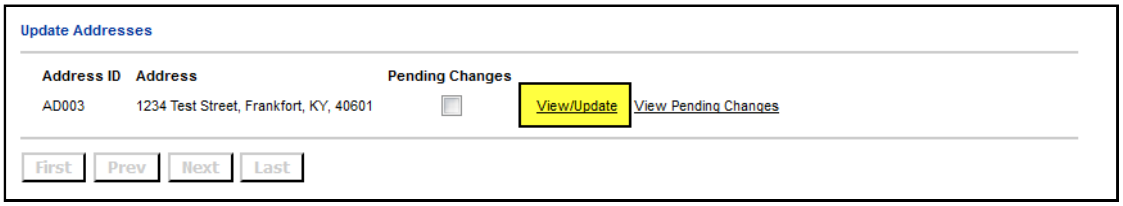
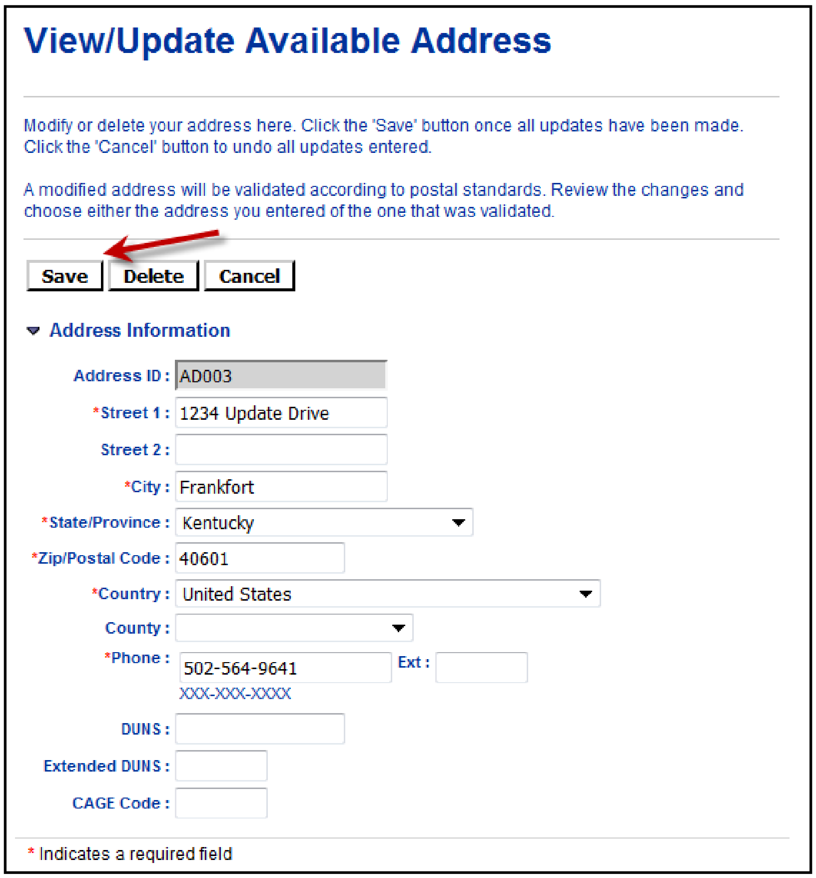
How to Update Addresses

This will update existing addresses on your vendor record.

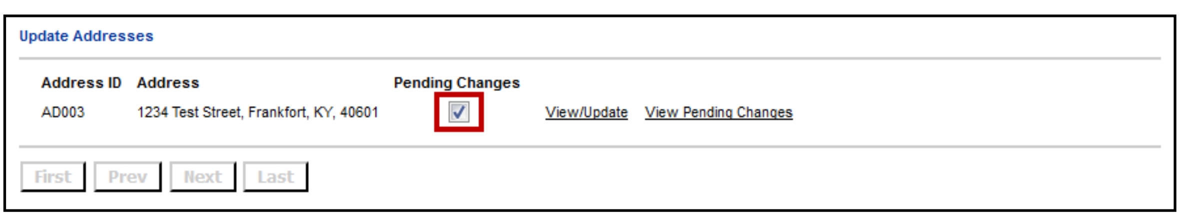
1. In the **Update Address** section of the page, identify the Address ID to update.
2. Click on the **View/Update** link to enter the *View/Update Available Address* page.



3. Update the desired field(s) and click the **Save** button.



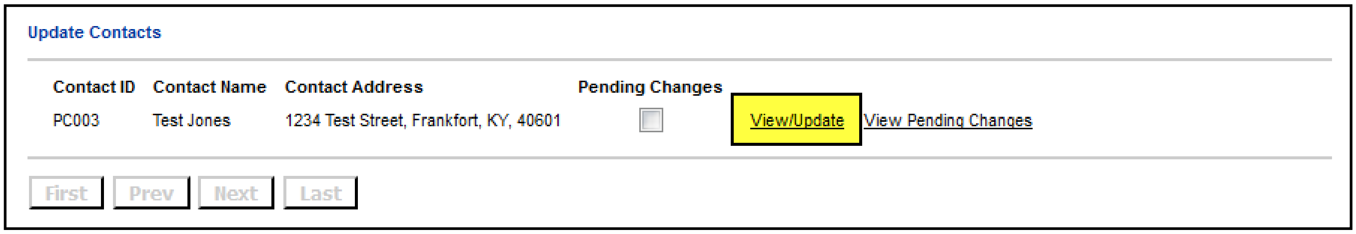
4. The **Pending Changes** box should be checked to indicate that the update is pending.



How to Update Contact

This will update existing contacts on your vendor record.

1. In the **Update Contacts** section of the page, identify the Contact ID to update.
2. Click on the **View/Update** link to enter the *View/Update Available Contact* page.

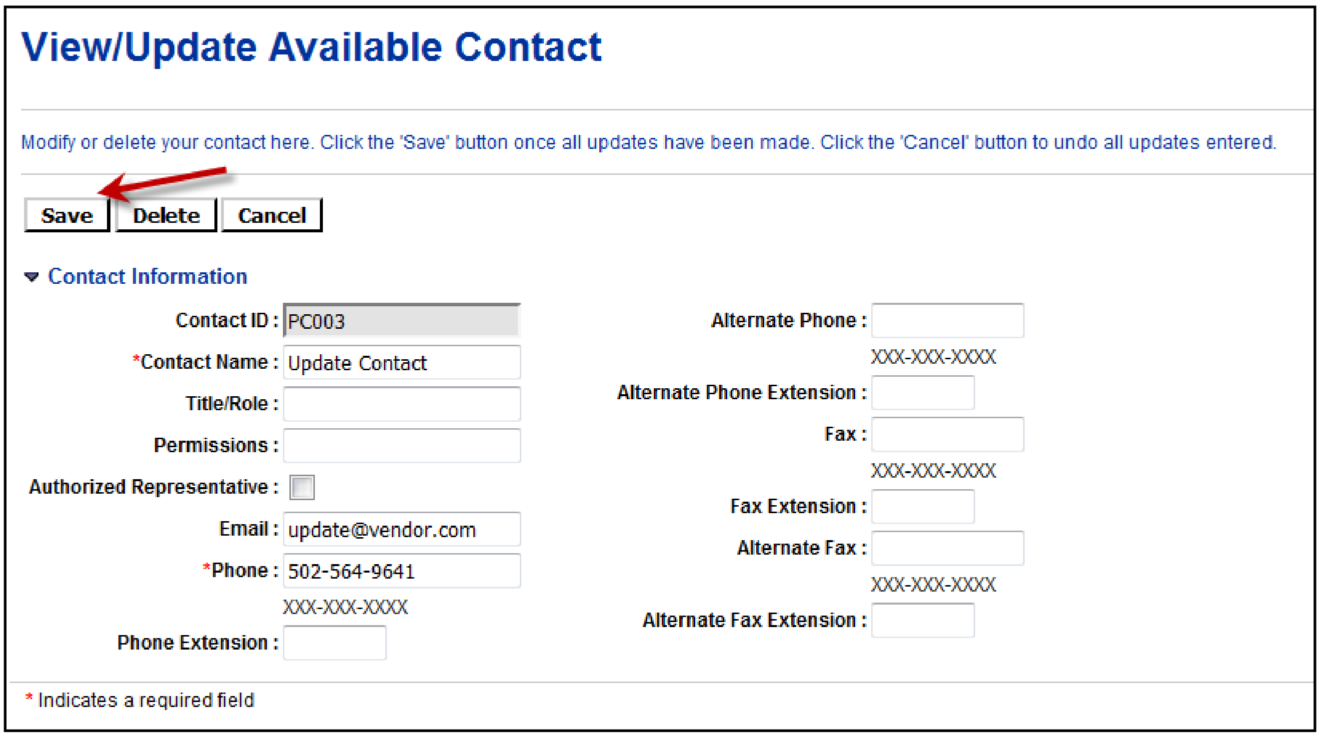


Update Contacts

Contact ID	Contact Name	Contact Address	Pending Changes		
PC003	Test Jones	1234 Test Street, Frankfort, KY, 40601		View/Update	View Pending Changes

First Prev Next Last

3. Update the desired field(s) and click the **Save** button.



View/Update Available Contact

Modify or delete your contact here. Click the 'Save' button once all updates have been made. Click the 'Cancel' button to undo all updates entered.

Save Delete Cancel

Contact Information

Contact ID : PC003

*Contact Name : Update Contact

Title/Role :

Permissions :

Authorized Representative :

Email : update@vendor.com

*Phone : 502-564-9641

XXX-XXX-XXXX

Phone Extension :

Alternate Phone :

XXX-XXX-XXXX

Alternate Phone Extension :

Fax :

XXX-XXX-XXXX

Fax Extension :

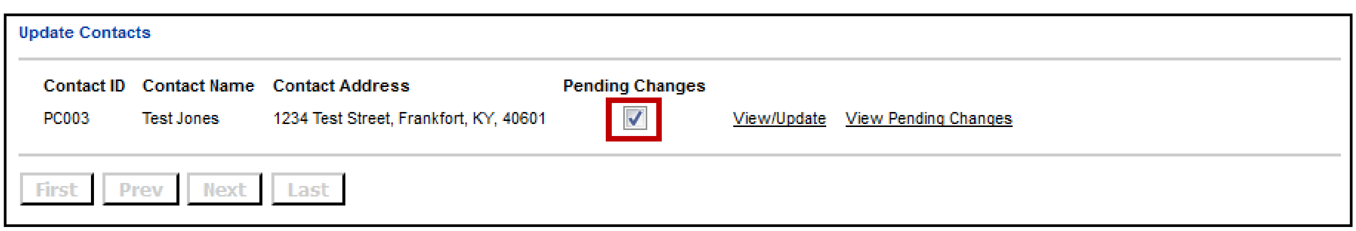
Alternate Fax :

XXX-XXX-XXXX

Alternate Fax Extension :

* Indicates a required field

4. The **Pending Changes** box should be checked to indicate that the update is pending.



Update Contacts

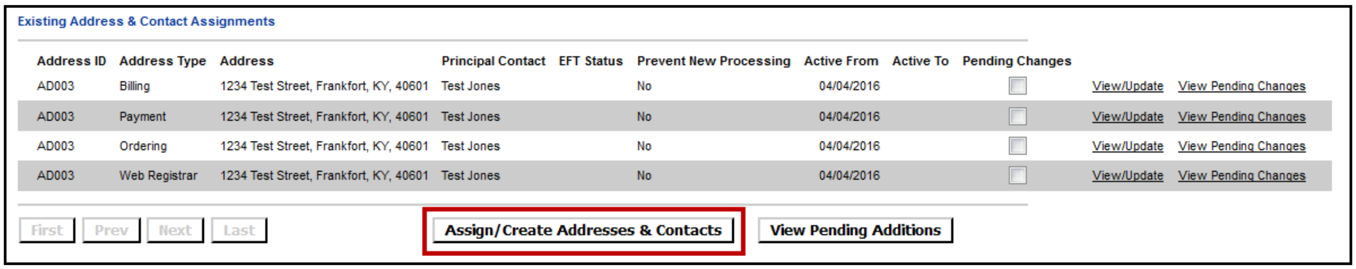
Contact ID	Contact Name	Contact Address	Pending Changes		
PC003	Test Jones	1234 Test Street, Frankfort, KY, 40601	☑	View/Update	View Pending Changes

First Prev Next Last

How to Add a New Address and Contact

This will add a new Payment or Ordering address.

1. In the **Existing Address & Contact Assignments** section of the page check that the address to add is not listed.
2. Click on the **Assign/Create Addresses & Contacts** button.

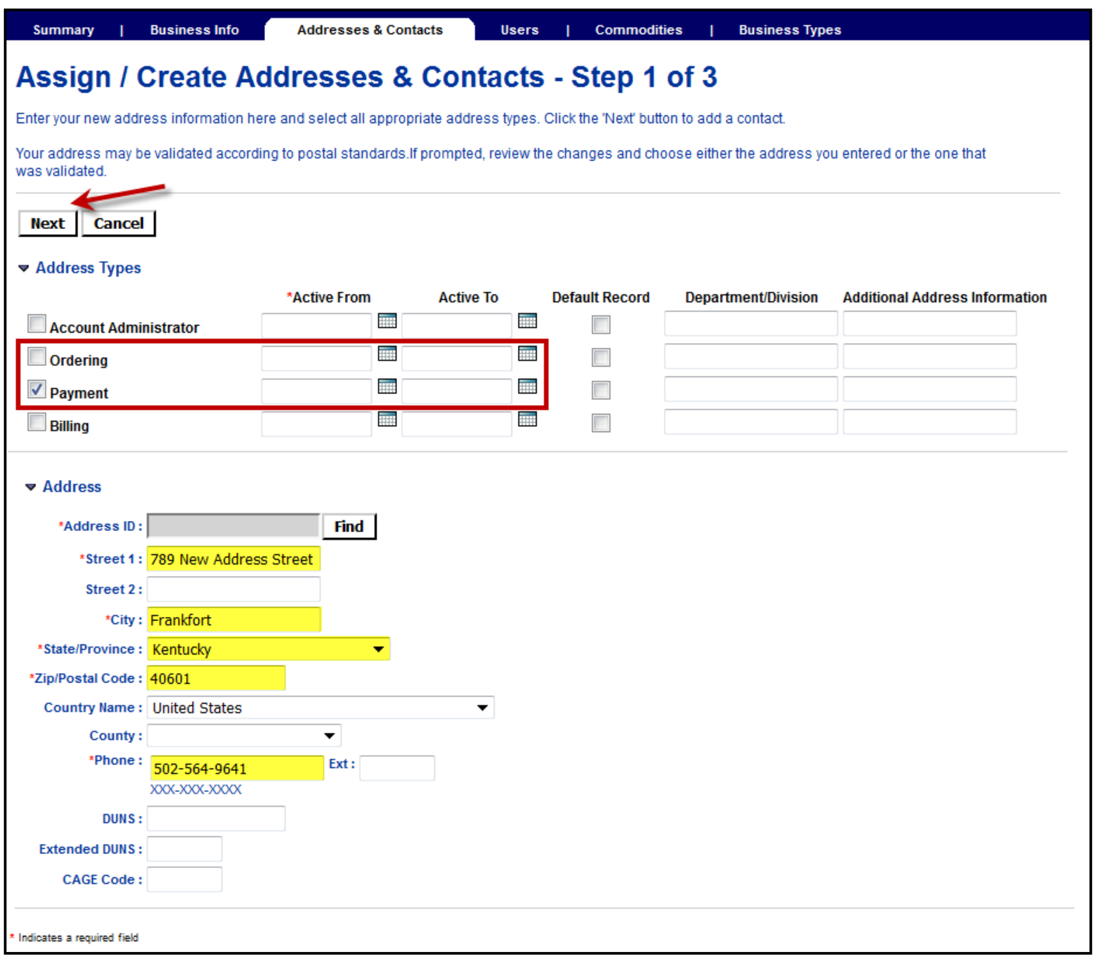


Existing Address & Contact Assignments

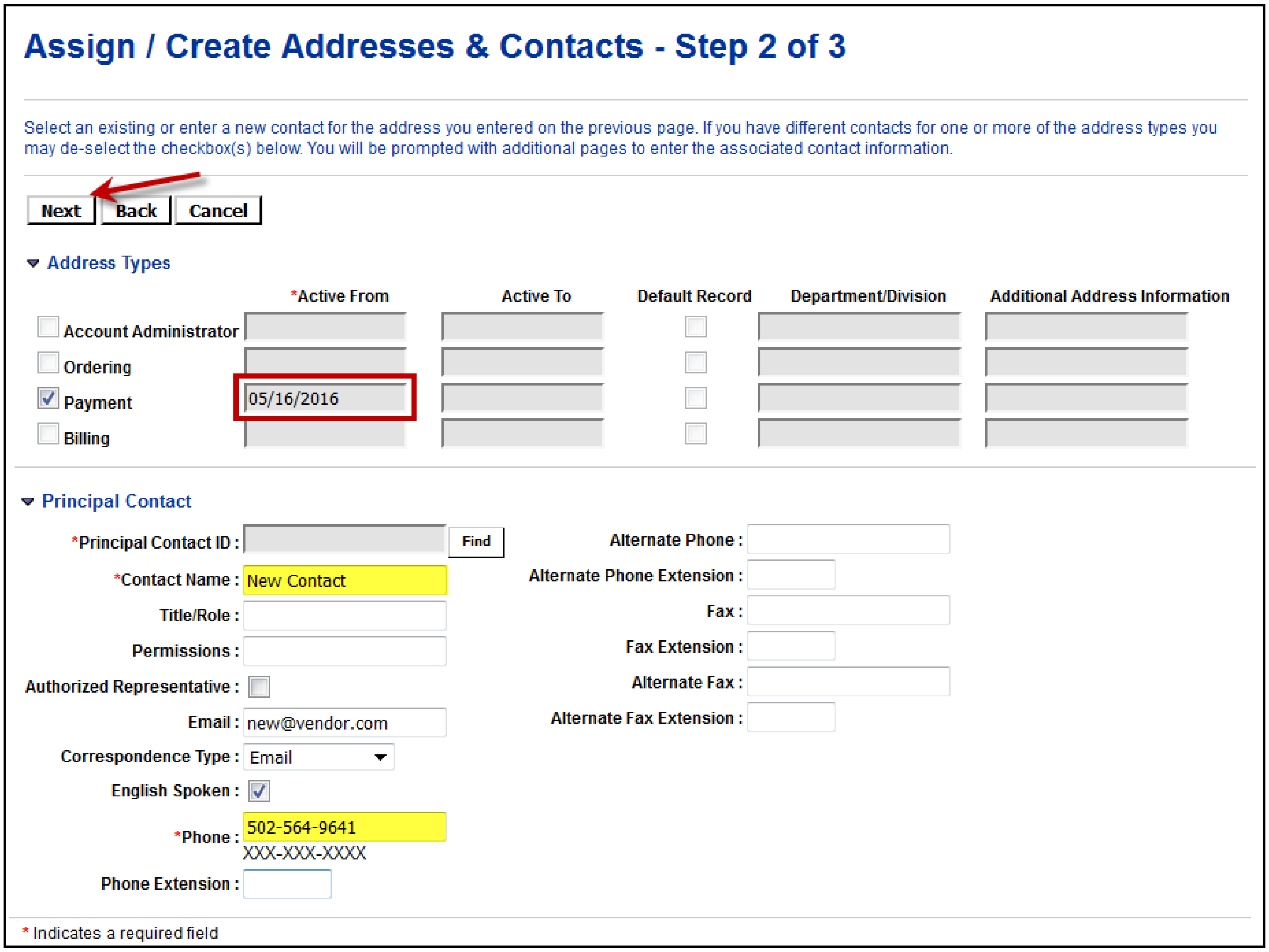
Address ID	Address Type	Address	Principal Contact	EFT Status	Prevent New Processing	Active From	Active To	Pending Changes		
AD003	Billing	1234 Test Street, Frankfort, KY, 40601	Test Jones		No	04/04/2016			View/Update	View Pending Changes
AD003	Payment	1234 Test Street, Frankfort, KY, 40601	Test Jones		No	04/04/2016			View/Update	View Pending Changes
AD003	Ordering	1234 Test Street, Frankfort, KY, 40601	Test Jones		No	04/04/2016			View/Update	View Pending Changes
AD003	Web Registrar	1234 Test Street, Frankfort, KY, 40601	Test Jones		No	04/04/2016			View/Update	View Pending Changes

First Prev Next Last | Assign/Create Addresses & Contacts | View Pending Additions

3. Check the box to indicate the Address Type you are adding to your record (Ordering, Payment or Both). The **Active From** date will automatically populate with the current date if it is not entered.
4. Complete the required fields for the new address. Then click the **Next** button to continue.



5. Complete the required fields for the new contact. You can use an existing contact by clicking the **Find** button and selecting the existing contact. Click **Next** to continue.



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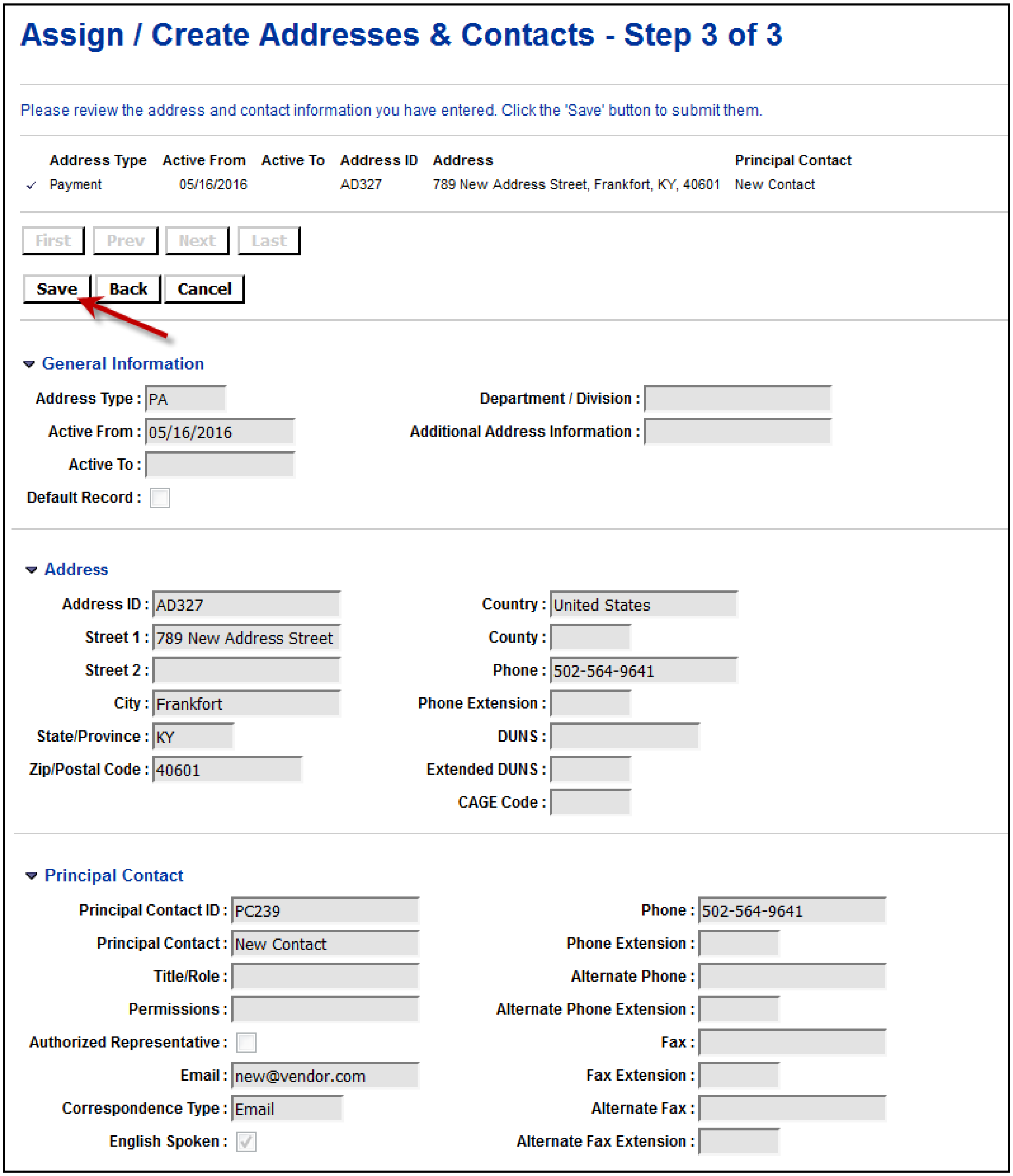
6. Review the new address and contact entry. Then click **Save** to finalize.



Assign / Create Addresses & Contacts - Step 3 of 3

Please review the address and contact information you have entered. Click the 'Save' button to submit them.

	Address Type	Active From	Active To	Address ID	Address	Principal Contact
✓	Payment	05/16/2016		AD327	789 New Address Street, Frankfort, KY, 40601	New Contact

First Prev Next Last

Save Back Cancel

General Information

Address Type : PA
Active From : 05/16/2016
Active To :
Default Record :
Department / Division :
Additional Address Information :

Address

Address ID : AD327
Street 1 : 789 New Address Street
Street 2 :
City : Frankfort
State/Province : KY
Zip/Postal Code : 40601
Country : United States
County :
Phone : 502-564-9641
Phone Extension :
DUNS :
Extended DUNS :
CAGE Code :

Principal Contact

Principal Contact ID : PC239
Principal Contact : New Contact
Title/Role :
Permissions :
Authorized Representative :
Email : new@vendor.com
Correspondence Type : Email
English Spoken : ✓
Phone : 502-564-9641
Phone Extension :
Alternate Phone :
Alternate Phone Extension :
Fax :
Fax Extension :
Alternate Fax :
Alternate Fax Extension :

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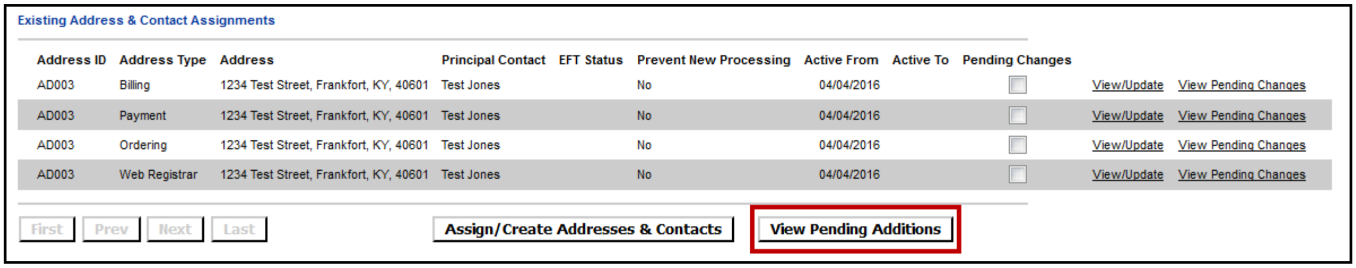
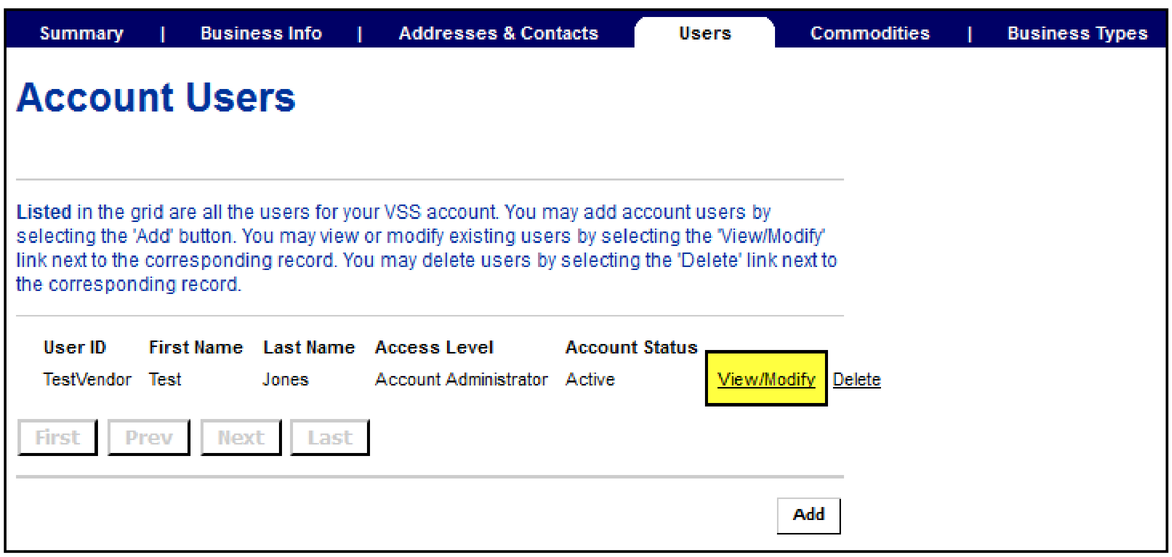
7. Click on the **View Pending Additions** button on the Addresses & Contacts sub-tab to view the new address and contact.

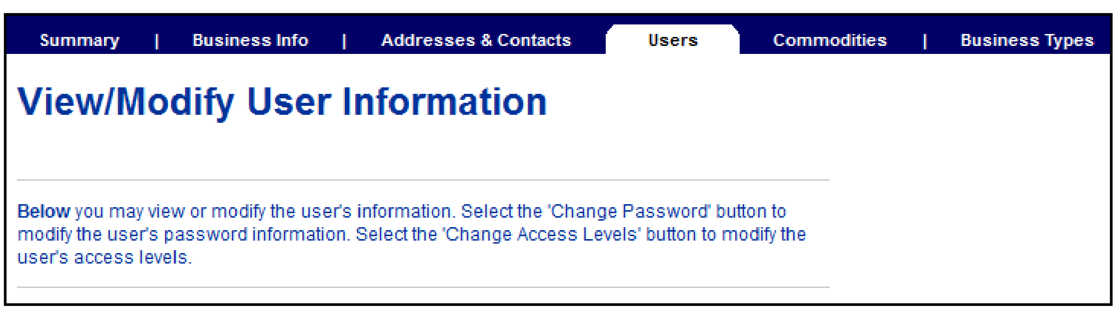


4 – Users: How to Update Existing User

This section allows you to maintain your vendor account holder's information. You can update the User ID account holder information or add a new User ID(s).

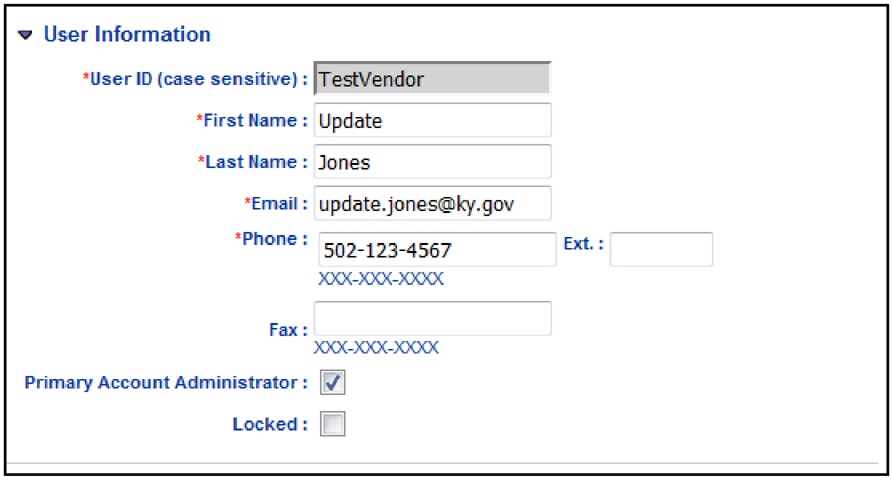
From the Users tab, click the **View/Modify** link to enter the *View/Modify User Information* page to update an existing user on the vendor record.



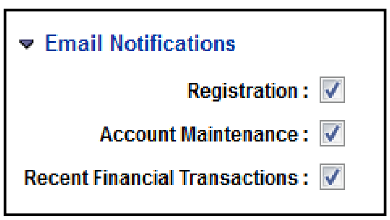


User Information

Update the desired field(s) for the **User Information**, and then click **Save** at the bottom of the page.



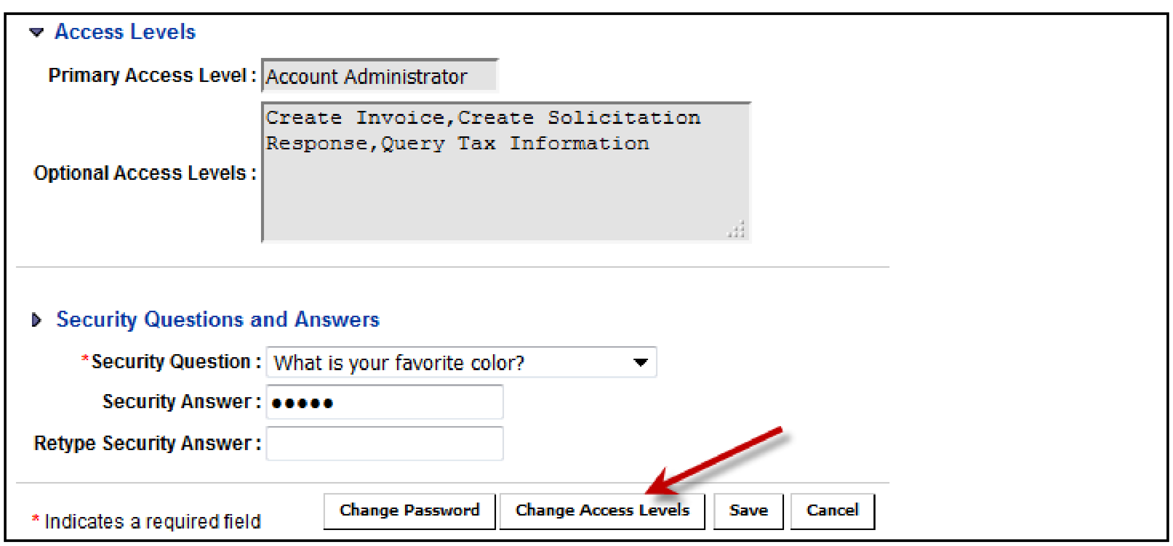
Email Notifications



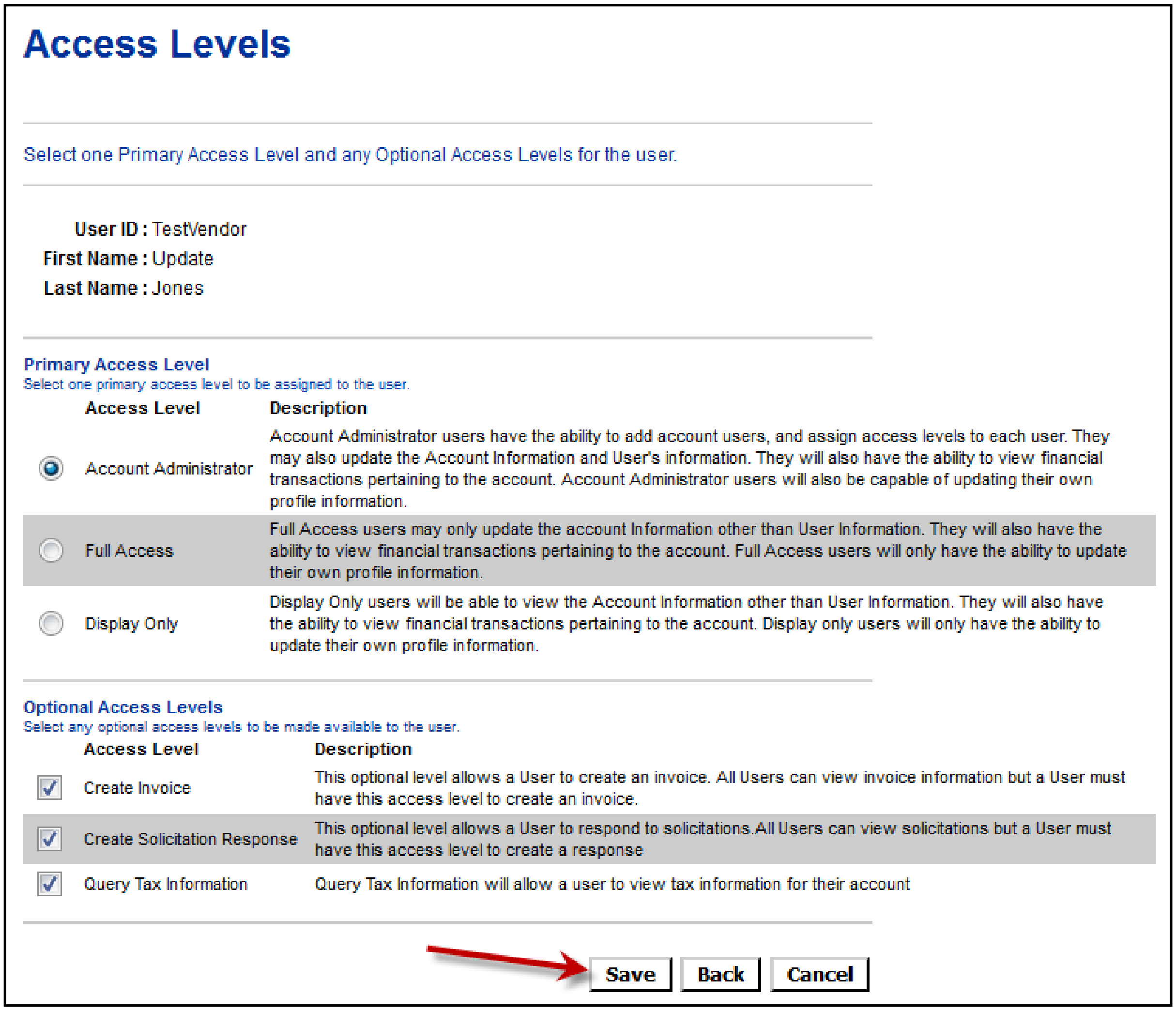
Update the desired options for **Email Notifications**, and then click **Save** at the bottom of the page.

Access Levels

1. Click **Change Access Levels** at the bottom of the page.

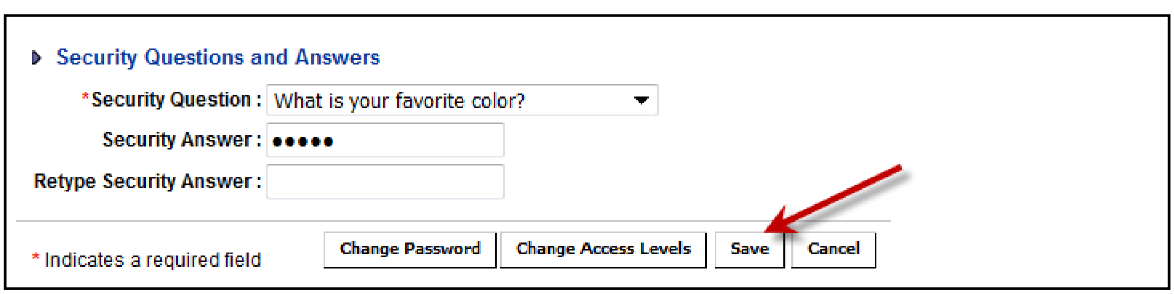


2. Update the desired access levels for the existing user, then click **Save**.



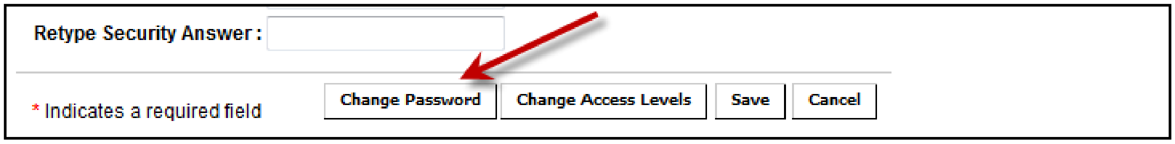
Security Questions and Answers

The **Security Question and Security Answer** can both be updated in this section. Update the desired Security Question and Answers fields and click **Save**.

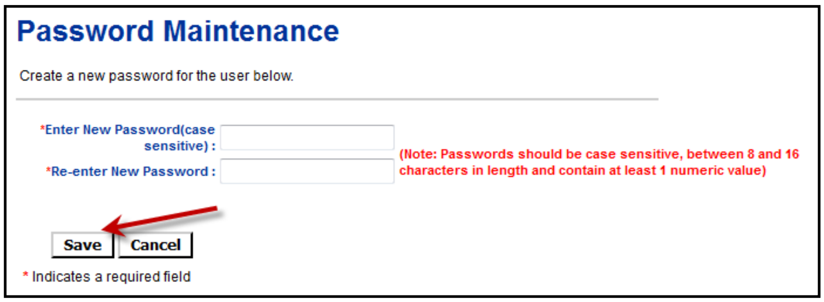


Change Password

1. Click **Change Password** at the bottom of the screen.



2. Type the new password in the **Enter New Password** and **Re-enter New Password** field. Then click **Save** to change the password for the user.



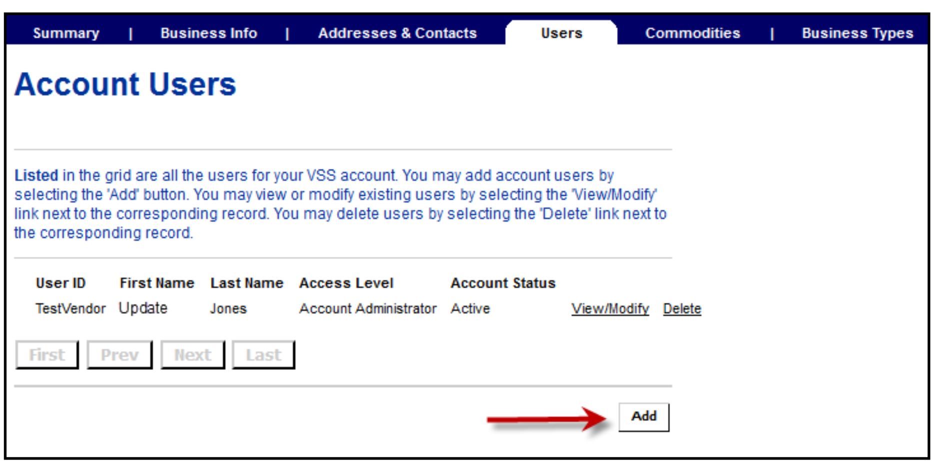
4 – Users: How to Add a New User

This will create a new User ID account holder.

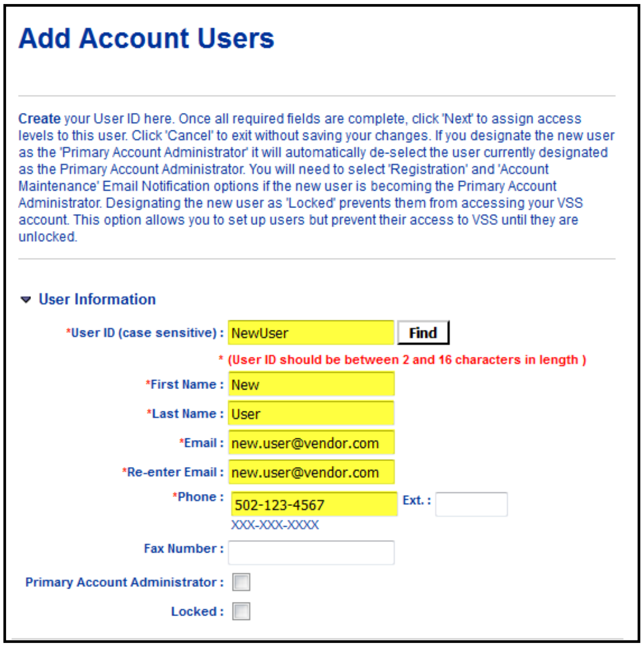
Please Note:

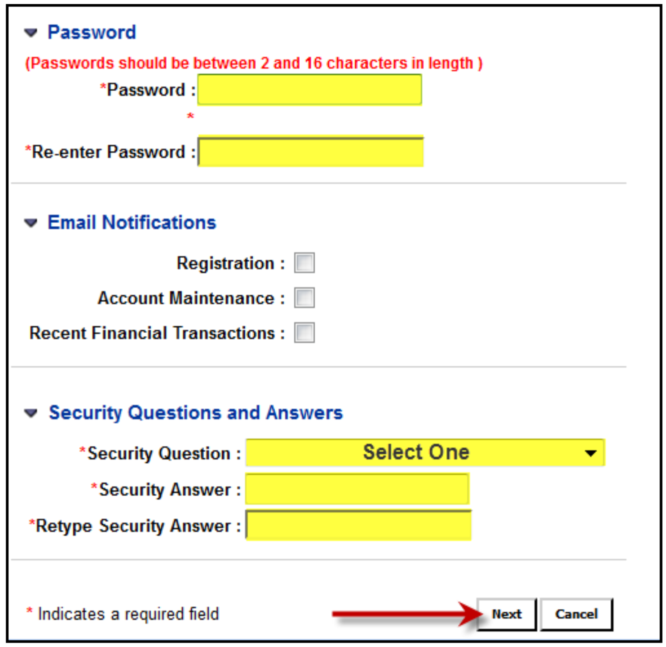
The Primary Account Administrator is the only user that has the ability to add new users. If that person is no longer with your company, contact the Finance Customer Resource Center (CRC) by email at Finance.CRCGroup@ky.gov or phone 502-564-9641 or toll-free 877-973-HELP (4357) to assist with updating your account.

1. Click the **Add** button.

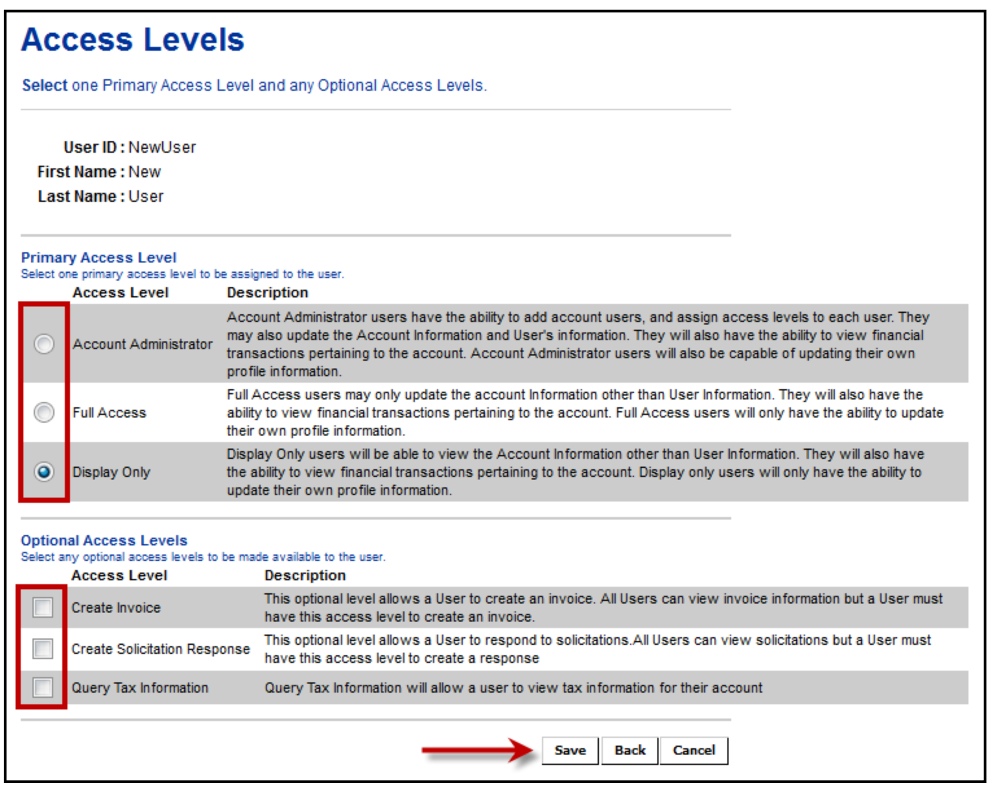


2. Create a new User ID and complete the required fields with the appropriate information. Then click **Next**.

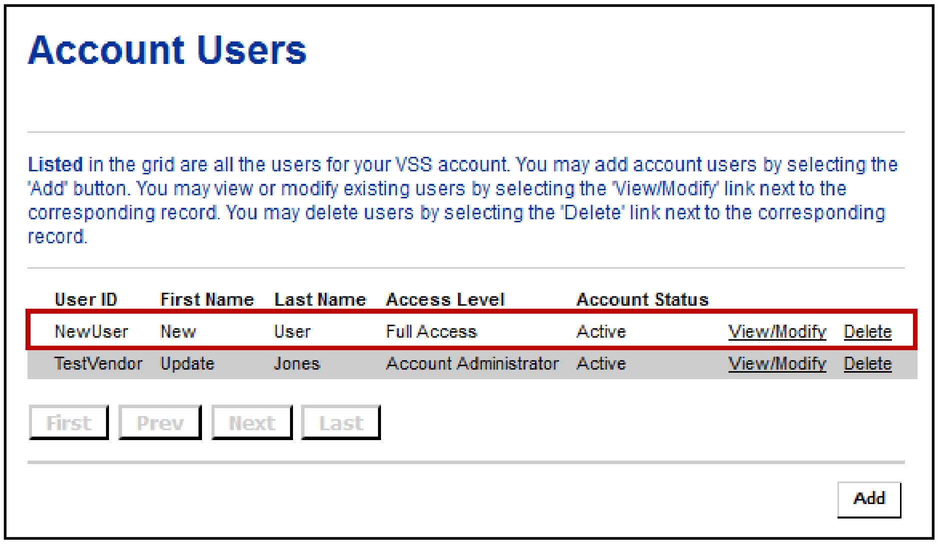




3. Select the appropriate **Access Levels** for the new account user.
4. Click the **Save** button to complete the process.



5. On the Account Users page, you should see the new User ID displayed.

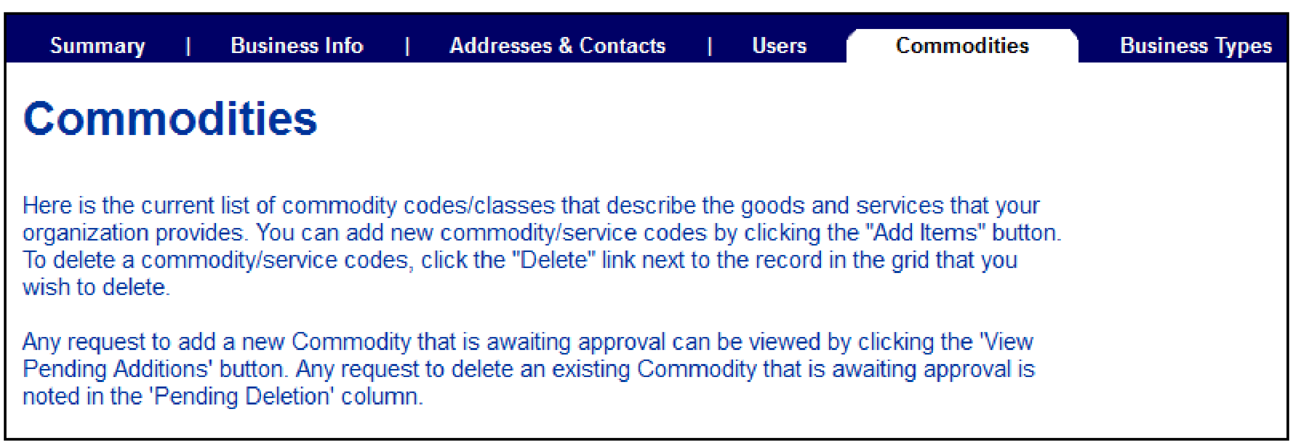


5 – Commodities

This section allows you to maintain a list of the commodity codes associated with your organization. Commodity codes are displayed as a 5-digit number that are categorized to represent products or services your organization can provide. It is recommended to register for all commodity codes that relate to your business. Future solicitations with the commodity codes you associated with will allow you to receive courtesy email notifications with announcements and updates for that solicitation.

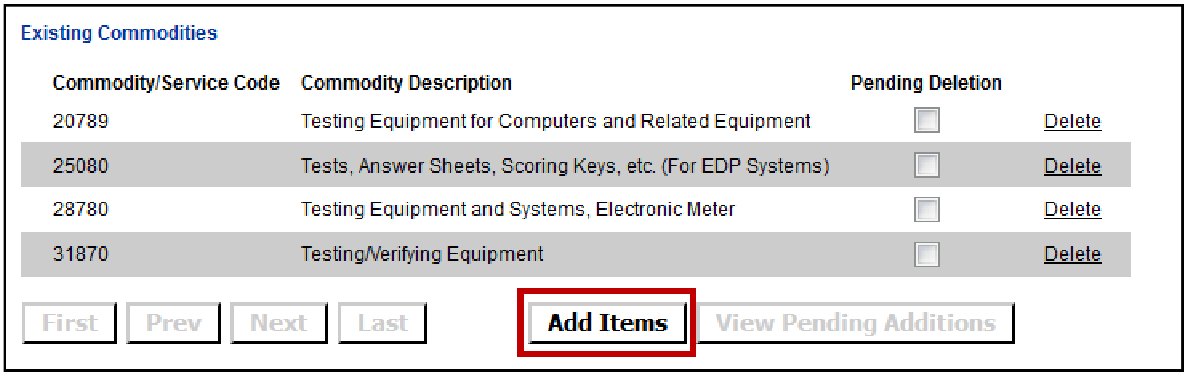
Please click on the following link to access a list of NIGP *commodity codes used by the Commonwealth of Kentucky:*

http://finance.ky.gov/services/eprocurement/Documents/Commodity_Code_Listings_5_Digit.xls



How to Add a Commodity Code

1. Click **Add Item** button.

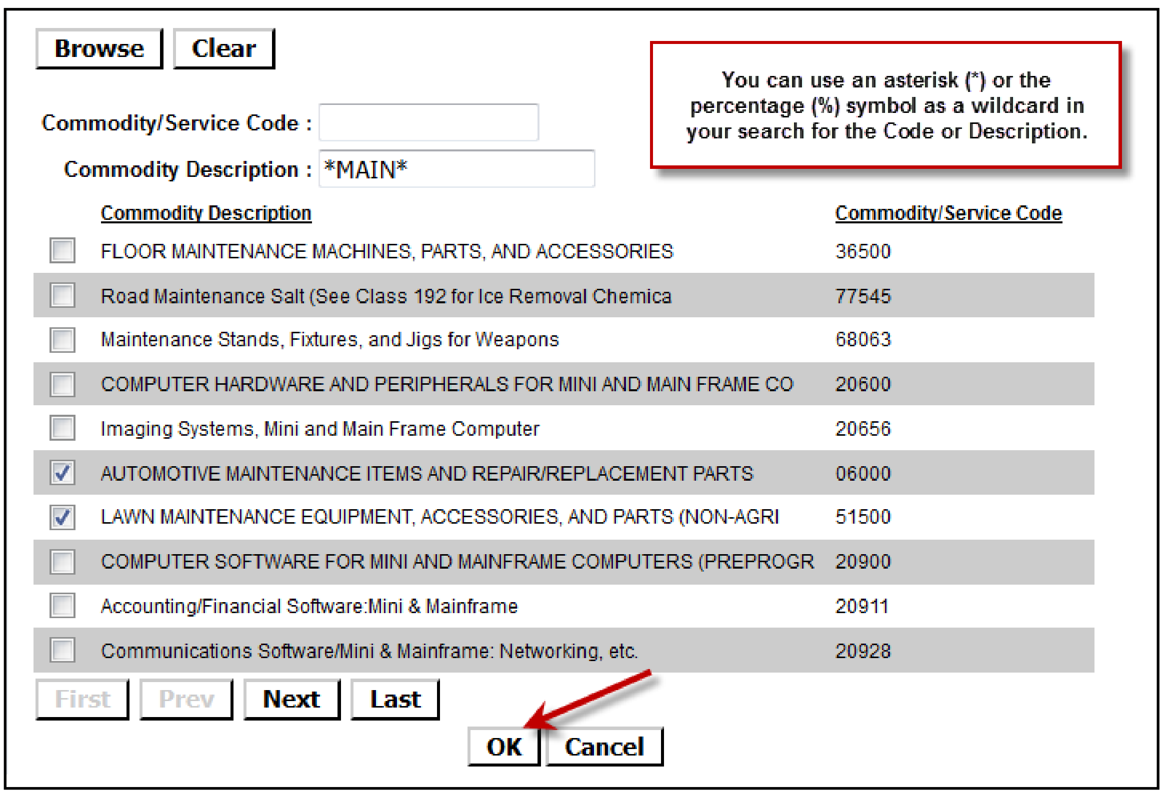


Existing Commodities

Commodity/Service Code	Commodity Description	Pending Deletion	
20789	Testing Equipment for Computers and Related Equipment	☐	Delete
25080	Tests, Answer Sheets, Scoring Keys, etc. (For EDP Systems)	☐	Delete
28780	Testing Equipment and Systems, Electronic Meter	☐	Delete
31870	Testing/Verifying Equipment	☐	Delete

First Prev Next Last Add Items View Pending Additions

2. Select the commodity codes(s) you want to associate with your organization. You can use the Commodity/Service Code and/or Commodity Description fields to search for commodity codes.
3. Click **OK** to add the commodity codes to your vendor record.



Browse Clear

Commodity/Service Code :

Commodity Description : *MAIN*

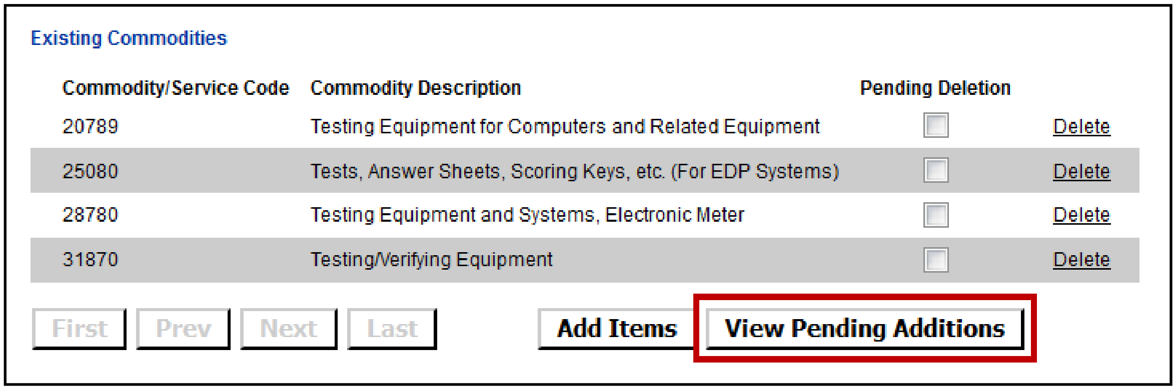
You can use an asterisk (*) or the percentage (%) symbol as a wildcard in your search for the Code or Description.

	Commodity Description	Commodity/Service Code
☐	FLOOR MAINTENANCE MACHINES, PARTS, AND ACCESSORIES	36500
☐	Road Maintenance Salt (See Class 192 for Ice Removal Chemica	77545
☐	Maintenance Stands, Fixtures, and Jigs for Weapons	68063
☐	COMPUTER HARDWARE AND PERIPHERALS FOR MINI AND MAIN FRAME CO	20600
☐	Imaging Systems, Mini and Main Frame Computer	20656
☑	AUTOMOTIVE MAINTENANCE ITEMS AND REPAIR/REPLACEMENT PARTS	06000
☑	LAWN MAINTENANCE EQUIPMENT, ACCESSORIES, AND PARTS (NON-AGRI	51500
☐	COMPUTER SOFTWARE FOR MINI AND MAINFRAME COMPUTERS (PREPROGR	20900
☐	Accounting/Financial Software:Mini & Mainframe	20911
☐	Communications Software/Mini & Mainframe: Networking, etc.	20928

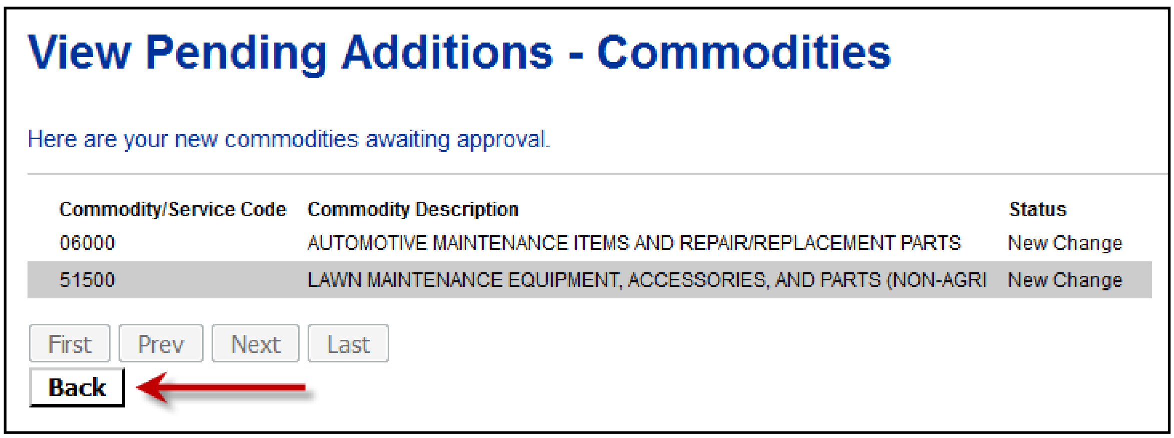
First Prev Next Last

OK Cancel

4. On the Commodities page, you can click the **View Pending Additions** button to see commodity codes you added.

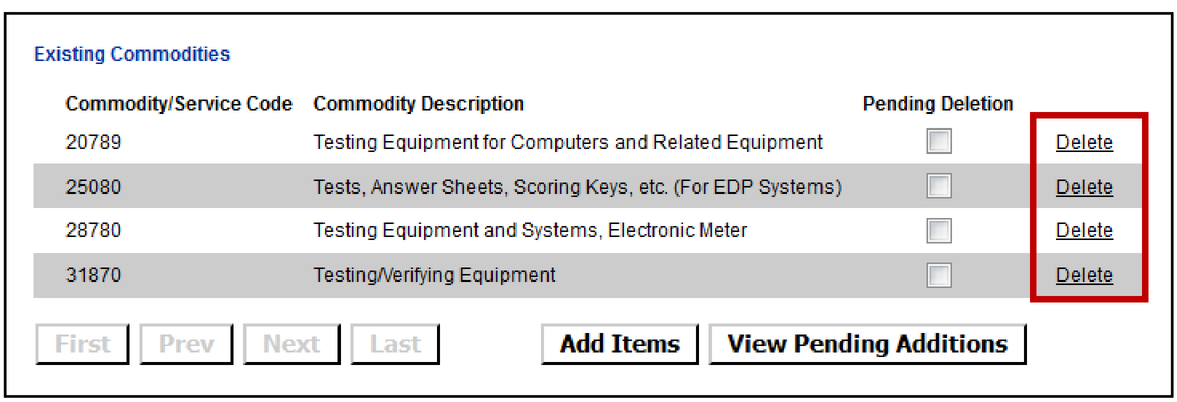


5. From the View Pending Additions – Commodities page, click **Back** to go back to your vendor account.

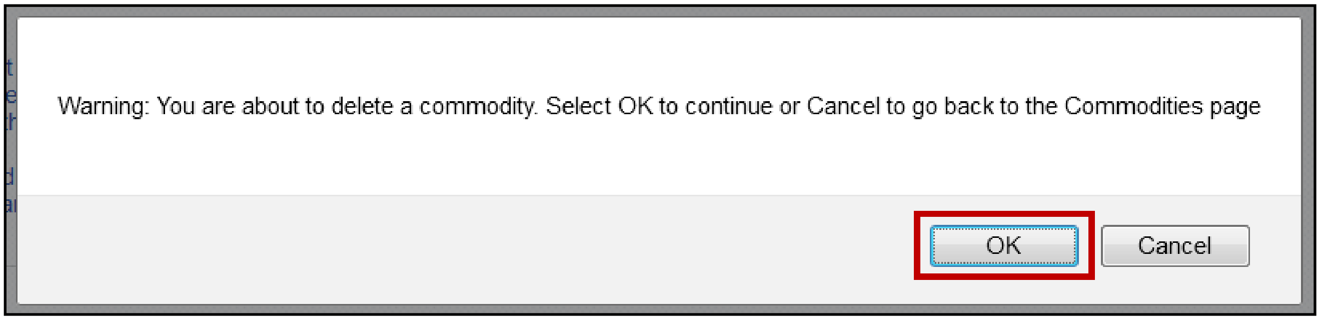


How to Remove Commodity Code

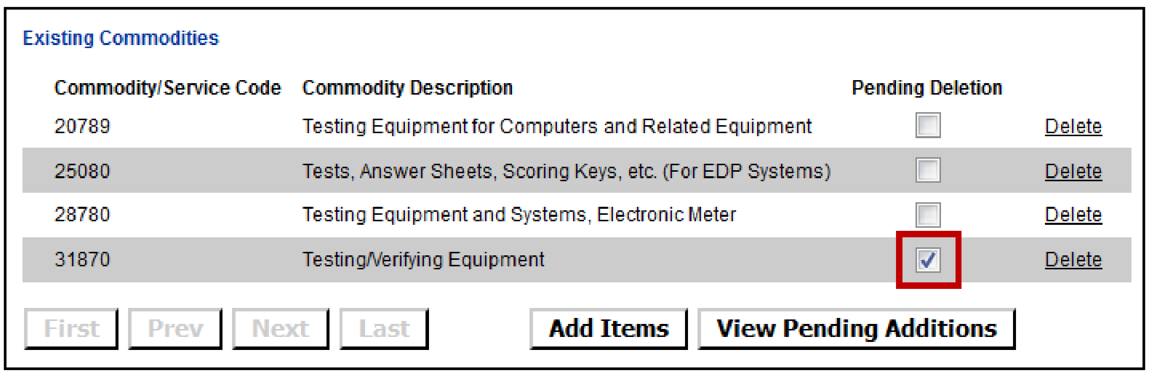
1. Click the **Delete** link on the row of the commodity code you want to remove.



2. Select **OK** in the following popup window.



3. The **Pending Deletion** column should now have a checkmark next to the commodity code(s) to remove.



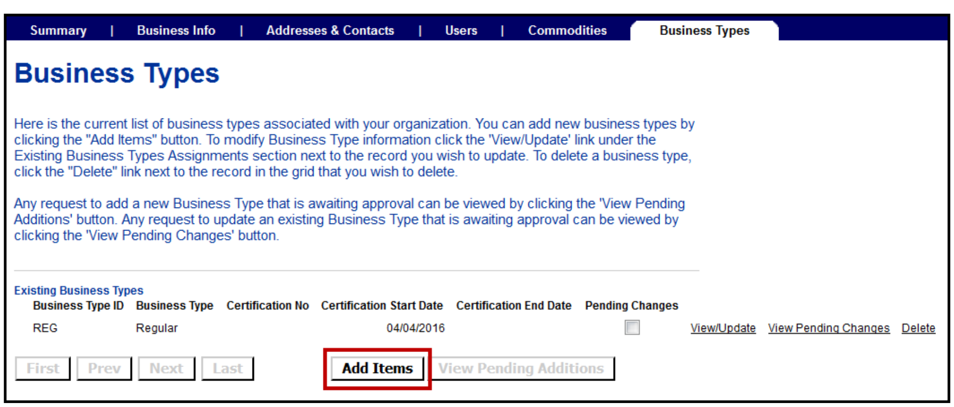
6 – Business Types

This section allows you to maintain a list of Business Types that apply to your organization. Business Types identify information about your company's operation.

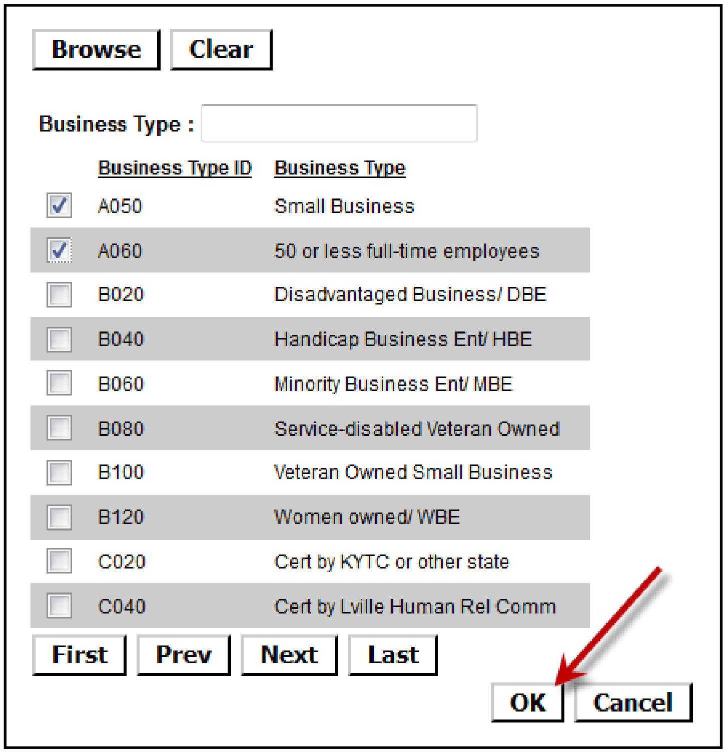
Business Types may be used to identify the type of ownership for your business (ie. Minority Owned, Woman Owned).

How to Add a Business Type

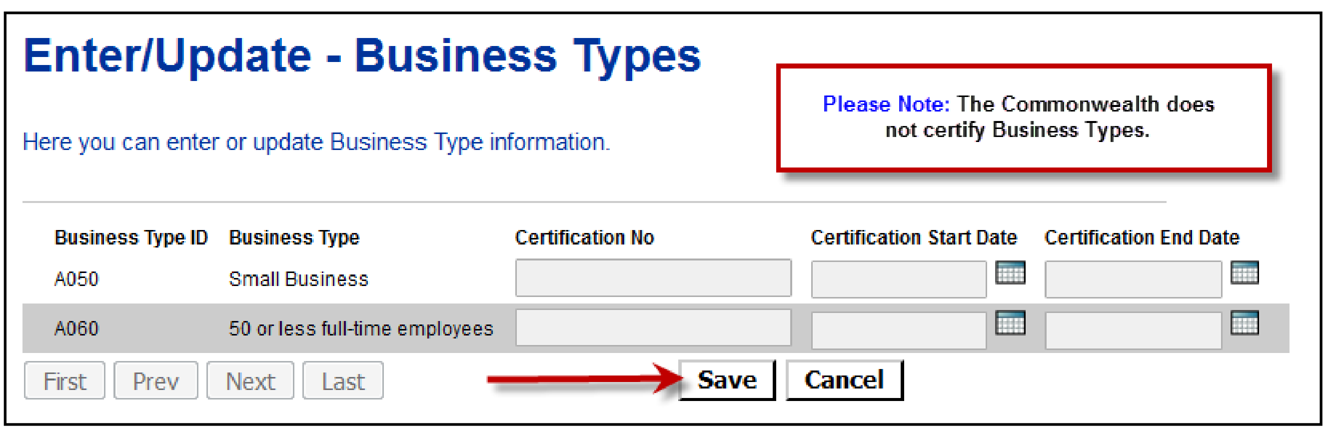
1. Click **Add Item** button.



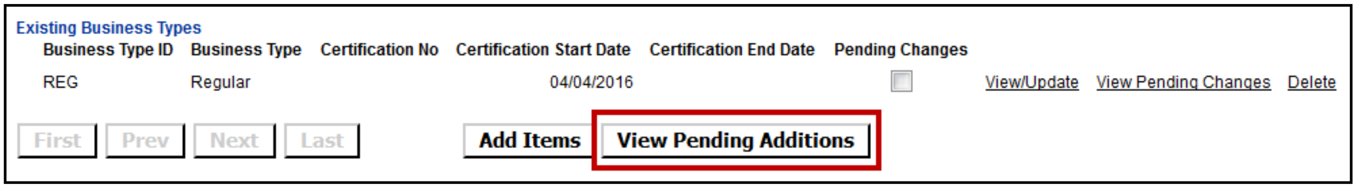
2. Select the business type(s) by checking the box next to the Business Type and then click **OK**.



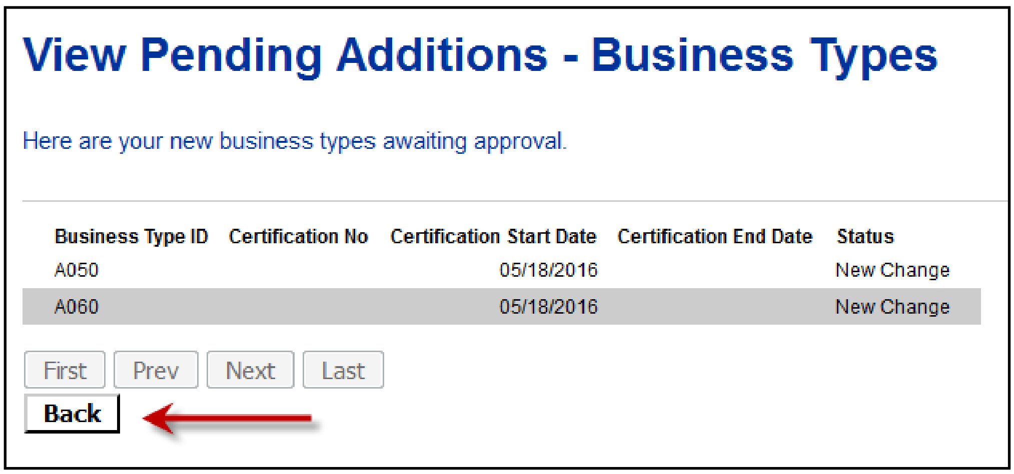
3. Enter the Certification number, start date and end date if applicable. Leaving the date fields blank will default to the current date.
4. Click the **Save** button.



5. Click **View Pending Additions** on the Business Types page to view business types you added.



6. From the View Pending Additions – Business Types page, click **Back** to go back to your vendor account.



Additional Help Resources

If you have any questions, please contact the help desk at (502) 564-9641, Toll Free at (877) 973-4357 or Finance.CRCGroup@ky.gov.

Additional information is available on the Commonwealth's Purchasing and eProcurement Services website: eprocurement.ky.gov